

**CA-PMM****Project Name:** Business Information System (BIS)**OCIO Project #:** 5225-93**Department:** CDCR**Reporting Period:** From: \_\_\_\_\_ To: \_\_\_\_\_**Team Member to Project  
Manager****Current Task Summary**

| Task or Deliverable  | Scheduled<br>Completion Date | Actual<br>Completion Date | Issues? |
|--|------------------------------|---------------------------|---------|
|  |                              |                           |         |
|  |                              |                           |         |
|  |                              |                           |         |
| <b>Accomplished this week</b>  |                              |                           |         |
|  |                              |                           |         |
| <b>Planned/Scheduled Completion in Next Two Weeks</b>                      |                              |                           |         |
|  |                              |                           |         |
| <b>Status Summary</b>  | <b>Yes/No</b>                | <b>Explanation</b>        |         |
| Will all assigned tasks be accomplished by their due date?                 |                              |                           |         |
| Are there any planned tasks that won't be completed?                       |                              |                           |         |
| Are there problems which affect your ability to accomplish assigned tasks? |                              |                           |         |
| Do you plan to take time off that is not currently scheduled?              |                              |                           |         |

**Status of Assigned Issues**

| Issue Number | Description | Due Date | Status |
|--------------|-------------|----------|--------|
|--------------|-------------|----------|--------|

## CA-PMM

**Project Name:** Business Information System (BIS)

**OCIO Project #:** 5225-93

**Department:** CDCR

**Reporting Period:** From: To:

## Team Member to Project Manager

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**CA-PMM****Project Name:** Business Information System (BIS)**OCIO Project #:** 5225-93**Department:** California Department of Corrections and  
Rehabilitation (CDCR)**Reporting Period:** From: 10/1/09 To: 10/31/09**Project Manager to Sponsor****Current Status Report**

| Questions   | Yes/No | Cause  | Impact  | Action Required  |
|---|--------|--|---|--|
| 1. Were recent milestones completed on schedule?        | Yes    |  |   |  |
| 2. Were any key milestones or deliverables rescheduled? | Yes    | Complexity of Time/Shift Bsn Rules created need for additional development | UAT and Go-Lives will be delayed.                   | Ensure completion of development in Q1 2010 to ensure project completion by June 2010      |
| 3. Was work done that was not planned?                  | No     |  |   |  |
| 4. Were there any changes to scope?                     | No     |  |   |  |
| 5. Were tasks added that were not originally estimated? | No     |  |   |  |
| 6. Were any tasks or milestones removed?                | No     |  |   |  |
| 7. Were any scheduled tasks not started?                | Yes    | Planned UAT related tasks for Shift/Time pilot were not started/completed  | UAT and Go-Lives will be delayed.                   | Ensure completion of development in Q1 2010 to ensure project completion by June 2010      |
| 8. Are there any new major issues?                      | No     |  |   |  |
| 9. Are there any staffing problems?                     | Yes    | Shortage of experienced trainers   | Quality of Supply Chain training could be affected. | Working with Business Units to identify existing trainers to assist with training efforts. |

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**OCIO Project #:** 5225-93

**Department:** California Department of Corrections and  
Rehabilitation (CDCR)

**Reporting Period:** From: 10/1/09 To: 10/31/09

## Project Manager to Sponsor

### Look Ahead View

| Questions   | Yes/No | Impact   | Action Required   |
|---|--------|--|---|
| 1. Will upcoming critical path milestones or deliverables be delayed?       | Yes    | Shift Scheduling User Acceptance Testing and go-lives will be delayed.   | Update Schedule based on review and analysis of Shift Scheduling requirement.                         |
| 2. Do any key milestones or deliverables need to be rescheduled?            | Yes    | Shift Scheduling roll out will be rescheduled.   | Update Schedule based on review and analysis of Shift Scheduling requirement.                         |
| 3. Is there any unplanned work that needs to be done?                       | No     |  |   |
| 4. Are there any expected or recommended changes to scope?                  | No     |  |   |
| 5. Are there any tasks not originally estimated that will need to be added? | No     |  |   |
| 6. Are there any tasks or milestones that should be removed from the plan?  | No     |  |   |
| 7. Are there any scheduled tasks whose start will likely be delayed?        | Yes    | Testing and deployment related tasks around time/shift may get delayed because of pending requirements validation. | A revised plan/approach document to complete design and development of time/shift is being finalized. |
| 8. Are any major new issues foreseeable?                                    | No     |  |   |
| 9. Are any staffing problems anticipated?                                   | Yes    | Shortage of SCM Trainers   | Working with Bsn. Units to ID existing trainers.  |

## CA-PMM

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**OCIO Project #:** 5225-93

**Department:** California Department of Corrections and Rehabilitation (CDCR)

**Reporting Period:** From: 10/1/09 To: 10/31/09

## Project Manager to Sponsor

### Current Status and Accomplishments:

*Describe deliverables completed and milestones met during **this reporting period**.*

☐ Material data loads for the 8 institutions (belonging to Push 1/Nov Go Live) has been tested and loaded into Production. Grievances reporting functionality rolled out to end users. Year-end financial statements provided to control agencies. In the process of obtaining Primary certification from SAP for the BIS Center of Expertise (COE) - SAP decided to give CDCR the certification based on BIS COE vision, framework, and concept definition.

### Project Milestones:

*List key milestones and their dates from the project schedule.*

| Milestone  | Target Date | Forecast Date | Status      | Cause & Impact to Implementation Date | Date Completed |
|--|-------------|---------------|-------------|---------------------------------------|----------------|
| Employee Grievances for Labor Relations                        | 10/5/09     | 10/12/09      | Completed   |                                       | 10/12/09       |
| Deployment of TPA for CPHCS                                    | 10/1/09     | 10/5/09       | Completed   |                                       | 10/5/09        |
| Material Master data uploads (for Nov Go Live) into Production | 11/1/09     | 11/1/09       | In Progress | Will be completed as planned.         |                |

## CA-PMM

**Project Name:** Business Information System (BIS)

**OCIO Project #:** 5225-93

**Department:** California Department of Corrections and Rehabilitation (CDCR)

**Reporting Period:** From: 10/1/09 To: 10/31/09

## Project Manager to Sponsor

### Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

|                 | On Plan<br><5% | Caution<br>5-10% | Significant Variance<br>>10% | Action Required  |
|-----------------|----------------|------------------|------------------------------|--|
| Schedule        |                |                  | X                            | Finalize revised Project schedule. Develop implementation schedule, resource requirements, and budget. Mini SPR for realigning schedule and deliverables is in progress. |
| Milestones      |                |                  | X                            | Revise project milestones based on the revised/updated project schedule for the rollouts   |
| Deliverables    |                | X                |                              | Deliverables for the remaining rollout implementation will have to be scheduled according to the revised project schedule  |
| Resources       |                | X                |                              | Project resources have to be aligned with the revised project schedule after finalizing the rollout approach   |
| OneTime Cost    | X              |                  |                              | Budget impact/changes have to be identified to the revised project schedule and deployment approach  |
| Continuing Cost | X              |                  |                              | No significant changes in support costs are anticipated because of the revised project schedule  |

**CA-PMM**

**Project Name:** Business Information System (BIS)

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**Department:** CDCR

**Reporting Period:** From: 10/1/09 To: 10/31/09

## Sponsor to Executive Committee

### Summary Milestones and Highlights

**Project Milestones:**

*List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.*

| Milestone  | Target Date | Forecast Date | Status      | If Delayed, Impact to Implementation Date | Date Completed |
|--|-------------|---------------|-------------|---|----------------|
| Employee Grievances for Labor Relations                        | 10/5/09     | 10/12/09      | Completed   |   | 10/12/09       |
| Deployment of TPA for CPHCS                                    | 10/1/09     | 10/5/09       | Completed   |   | 10/5/09        |
| Material Master data uploads (for Nov Go Live) into Production | 11/1/09     | 11/1/09       | In Progress | Will be completed as planned.             |                |

**CA-PMM****Project Name:** Business Information System (BIS)**OCIO Project #:** 5225-93**Department:** CDCR**Reporting Period:** From: 10/1/09 To: 10/31/09**Sponsor to Executive  
Committee****Variances**

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

\* Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis

|                 | On Plan<br><5% | Caution<br>5-10% | Significant Variance<br>>10% | Action Required  |
|-----------------|----------------|------------------|------------------------------|--|
| Schedule        |                |                  | X                            | Finalize revised Project schedule. Develop implementation schedule, resource requirements, and budget. Mini SPR for realigning schedule and deliverables is in progress. |
| Milestones      |                |                  | X                            | Revise project milestones based on the revised/updated project schedule for the rollouts   |
| Deliverables    |                | X                |                              | Deliverables for the remaining rollout implementation will have to be scheduled according to the revised project schedule  |
| Resources       |                | X                |                              | Project resources have to be aligned with the revised project schedule after finalizing the rollout approach   |
| One Time Cost   | X              |                  |                              | Budget impact/changes have to be identified to the revised project schedule and deployment approach  |
| Continuing Cost | X              |                  |                              | No significant changes in support costs are anticipated because of the revised project schedule  |



**CA-PMM****Project Name:** Business Information System (BIS)**OCIO Project #:** 5225-93**Department:** CDCR**Reporting Period:** From: 10/1/09 To: 10/31/09**Sponsor to Executive  
Committee****Monitoring Vital Signs Scorecard**

| Vital Sign  | Variance                | Value | Your Score         | Score Justification  |
|---|-------------------------|-------|--------------------|--|
| 1. Customer Buy-In                                  | High Degree of Buy-In   | 0     | <b>1</b><br>Yellow | The site-based deployment approach has introduced new transition issues as well as delayed realization of business benefits.                         |
|   | Medium Degree of Buy-In | 1     |                    |  |
|   | Low Degree of Buy-In    | 2     |                    |  |
| 2. Technology Viability                             | Strong Viability        | 0     | <b>0</b><br>Green  |  |
|   | Medium Viability        | 1     |                    |  |
|   | Weak Viability          | 2     |                    |  |
| 3. Status of the Critical Path (delay)              | <5%                     | 0     | <b>1</b><br>Yellow | The site-based deployment approach and aggressive deployment schedule may result in schedule slippages along the critical path and project end date. |
|   | 5% to 10%               | 1     |                    |  |
|   | >10%                    | 2     |                    |  |
| 4. Cost-to-Date vs. Estimated Cost-to-Date (higher) | <5%                     | 0     | <b>0</b><br>Green  |  |
|   | 5% to 10%               | 1     |                    |  |
|   | >10%                    | 2     |                    |  |

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|   |                                  |   |   |        |  |
|---|----------------------------------|---|---|--------|--|
| 5. High-Probability, High-Impact Risks    | 0 to 3                           | 0 | 1 | Yellow | Aggressive deployment schedule combined with potential production support issues could introduce additional stress in the business organization. |
|   | 4 to 6                           | 1 |   |        |  |
|   | >6                               | 2 |   |        |  |
| 6. Unresolved Issues (on time resolution) | On time                          | 0 | 2 | Red    | Issues with Time and Shift Management functionality and business requirements may potentially impact solution design and subsequent deployments. |
|   | Late with no impact              | 1 |   |        |  |
|   | Late impacting the critical path | 2 |   |        |  |
| 7. Sponsorship Commitment                 | Fully engaged                    | 0 | 0 | Green  |  |
|   | Partially engaged                | 1 |   |        |  |
|   | Inadequate engagement            | 2 |   |        |  |
| 8. Strategy Alignment                     | Strong alignment                 | 0 | 0 | Green  |  |
|   | Partial alignment                | 1 |   |        |  |
|   | Weak or no alignment             | 2 |   |        |  |
| 9. Value-to-Business                      | Strong                           | 0 | 1 | Yellow | Until all the integrated functionality is fully deployed, CDCR may not realize intended business benefits.                                       |
|   | Medium                           | 1 |   |        |  |
|   | Weak                             | 2 |   |        |  |

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|  |                               |   |   |        |  |
|--|-------------------------------|---|---|--------|--|
| 10. Vendor Viability (provide rationale for the rating in the field following the scorecard) | Strong                        | 0 | 1 | Yellow | The new vendor Project Director has addressed gaps in the Organizational Change Management (OCM) and PM that were reported previously.                                     |
|  | Medium                        | 1 |   |        |  |
|  | Weak                          | 2 |   |        |  |
| 11. Milestone Hit Rate (rate of achievement as planned)                                      | >90% on time                  | 0 | 1 | Yellow | Under staffing, steep learning curve associated with SAP, and task dependencies in the schedule will have a drag effect on the team's ability to meet critical milestones. |
|  | 80-90% on time                | 1 |   |        |  |
|  | <80% on time                  | 2 |   |        |  |
| 12. Deliverable Hit Rate (rate of production as planned)                                     | >90% on time                  | 0 | 1 | Yellow | Under staffing, under skilling, and task dependencies in the schedule will have a drag effect on the team's ability to meet critical milestones.                           |
|  | 80-90% on time                | 1 |   |        |  |
|  | <80% on time                  | 2 |   |        |  |
| 13. Actual vs. Planned Resources   | >90% assigned and available   | 0 | 1 | Yellow | The timely completion of project tasks and the sustainable support of BIS is dependent on filling the current staff vacancies and skill gaps.                              |
|  | 80-90% assigned and available | 1 |   |        |  |
|  | <80% assigned and available   | 2 |   |        |  |

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|  |                      |   |                           |  |
|--|----------------------|---|---------------------------|--|
| 14. Overtime Utilization<br>(% of effort that is overtime) | <15%                 | 0 | <b>1</b><br><b>Yellow</b> | The aggressive project timeline necessitates about 20% overtime work to accommodate deadlines.   |
|  | 15-25%               | 1 |                           |  |
|  | >25%                 | 2 |                           |  |
| 15. Team Effectiveness                                     | Highly Effective     | 0 | <b>1</b><br><b>Yellow</b> | Given the complexity of the project and the high level of integration required between teams, team dynamics has a steeper learning curve and lengthy maturation process. |
|  | Moderately Effective | 1 |                           |  |
|  | Ineffective          | 2 |                           |  |
| <b>Total</b>   |                      |   | <b>12</b> <b>Y</b>        |  |

*Green = 0 - 8**Yellow = 9 - 19**Red = 20+***Vendor Viability Rating Rationale**

The Vendor's new Project Director is now acclimated and has addressed several leadership and effectiveness issues. This has resulted in improved communication with Project Teams and the Business side of the organization. The CIO leadership of the project has resulted in improvements in the OCM area and increased business stakeholder engagement. Continued Executive focus at the sponsorship level and business stakeholders have been significant contributing factors for the overall improvement in this area.